MCARI

The Great Displacement

State Collapse and Population Restructuring in Post-Coup Myanmar (2019 vs. 2024)

An Analytical Brief By The Myanmar Conflict Analysis Research Institute (MCARI)

Date: August 2024

Executive Summary

An analysis of the State Administration Council's (SAC) October 2024 census reveals a state in a condition of advanced administrative collapse. Against the 2019 baseline, the census failed to enumerate 18.9 million people, creating a 37% "governance gap" that serves as a direct, empirical measure of the state's retreat. The national average census coverage was a mere 54%, confirming the SAC's inability to perform basic state functions in nearly half the country. The collapse is not uniform; it is overwhelmingly a rural phenomenon. In conflict epicenters like Sagaing Region, urban census coverage remains at 59%, while rural coverage has plummeted to a catastrophic 6%. In a stunning counter-narrative, key urban strongholds are simultaneously acting as population "sinks," with Naypyitaw's urban coverage reaching 130%, indicating a strategic consolidation of population around the regime's core. The primary finding is that the conflict has not just displaced people, but has displaced governance itself, fundamentally restructuring Myanmar into urban islands of control amidst a vast, "uncountable" rural periphery.

Background & Methodology

This analysis is built upon a comparative framework using two primary datasets:

- Baseline (2019): Township-level population data from the 2019 Inter-Censal Survey. This survey provides the most comprehensive and statistically reliable demographic snapshot of Myanmar prior to the 2021 coup. The national baseline population used in this analysis is 51,316,756.
- Post-Coup (2024): Population data collected by the State Administration Council (SAC) in October 2024. The total enumerated population from this source is 32,191,407.

Due to the unavailability of a reliable township-level baseline dataset for this specific analysis, the final methodology was pivoted to the State/Region level to ensure the utmost analytical integrity. The core metric is the "Census Coverage Ratio" (2024 Enumerated Population / 2019 Baseline Population), which functions as a direct proxy for the SAC's territorial and administrative control.

Key Findings

1. A Quantified State Collapse: The SAC failed to account for 18.9 million people, or 37% of the 2019 baseline population. The average national census coverage of only 54% provides definitive proof of a state unable to reach nearly half its territory.

2. The Geographic Fracture: State control has catastrophically declined in conflict zones. Chin State (6% coverage), Rakhine State (11%), and Kayah State (12%) are now functionally outside of central administrative control.

3. The Rural vs. Urban Divide: The state's collapse is primarily rural. In Sagaing Region, the gap between urban (59%) and rural (6%) coverage is stark, proving the SAC's governance has retreated into urban centers.

4. The "Naypyitaw Effect": While rural areas collapse, key urban centers are consolidating. Naypyitaw (130% urban coverage), Bago (127%), and Mon (117%) all show urban population counts exceeding their 2019 baseline, identifying them as critical "sinks" for populations seeking security or aligned with the regime.
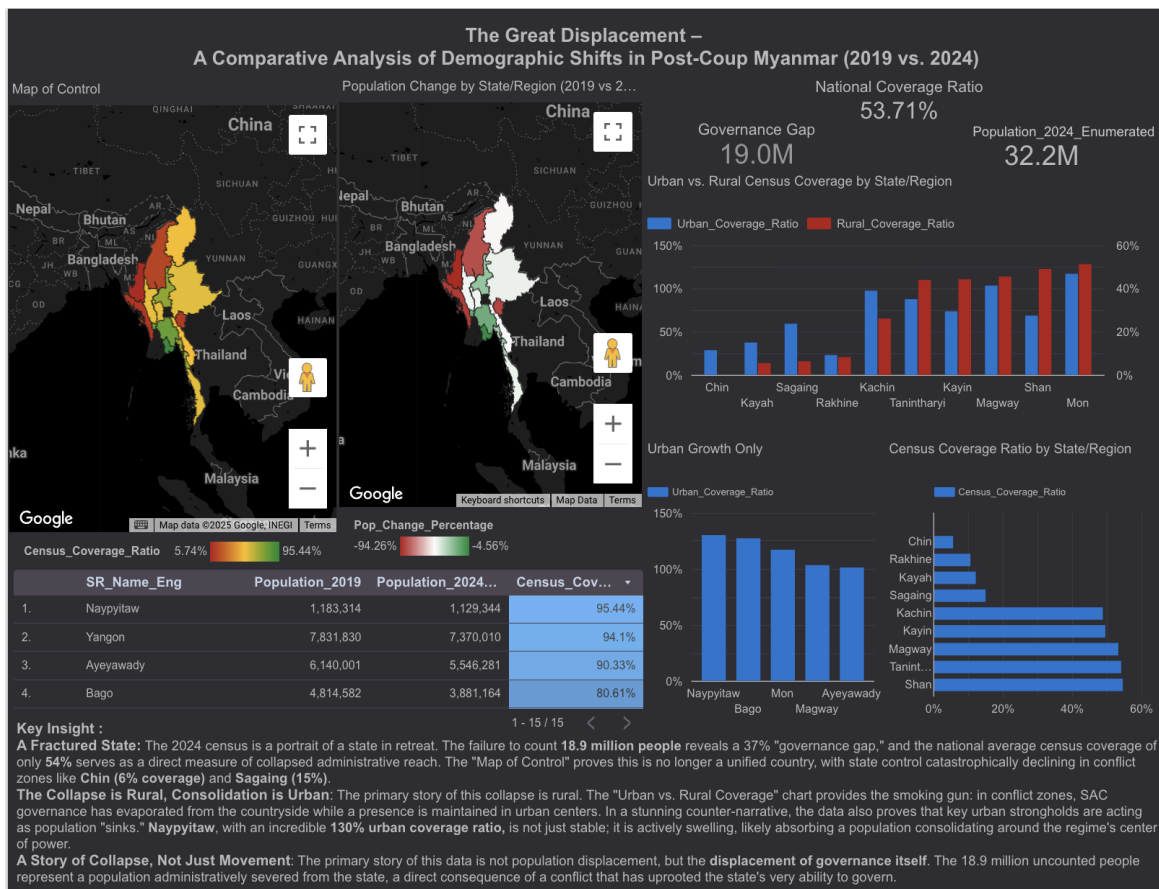
Analysis: A Tale of Two Myanmars

The Governance Gap: A State in Retreat

The 2024 census's most powerful finding is its own incompleteness. The 19 million uncounted people are not a statistical error but the result of a state being physically unable to access its own territory. This "governance gap" is the definitive metric of state failure.
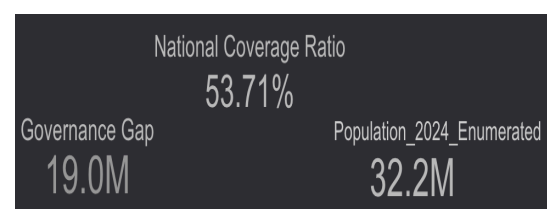
The "Map of Control" visualizes this failure, showing a clear geographic divide between the stable core (Yangon, Naypyitaw) and the collapsed peripheries. The ranked bar chart, "Census Coverage Ratio by State/Region," provides the granular

proof, acting as a league table of state control where conflict-torn regions anchor the bottom.

The Great Displacement –
A Comparative Analysis of Demographic Shifts in Post-Coup Myanmar (2019 vs. 2024)

Key Insight :
A Fractured State: The 2024 census is a portrait of a state in retreat. The failure to count **18.9 million people** reveals a 37% "governance gap," and the national average census coverage of only **54%** serves as a direct measure of collapsed administrative reach. The "Map of Control" proves this is no longer a unified country, with state control catastrophically declining in conflict zones like **Chin (6% coverage)** and **Sagaing (15%)**.
The Collapse is Rural, Consolidation is Urban: The primary story of this collapse is rural. The "Urban vs. Rural Coverage" chart provides the smoking gun: in conflict zones, SAC governance has evaporated from the countryside while a presence is maintained in urban centers. In a stunning counter-narrative, the data also proves that key urban strongholds are acting as population "sinks." **Naypyitaw**, with an incredible **130% urban coverage ratio,** is not just stable; it is actively swelling, likely absorbing a population consolidating around the regime's center of power.
A Story of Collapse, Not Just Movement: The primary story of this data is not population displacement, but the **displacement of governance itself**. The 18.9 million uncounted people represent a population administratively severed from the state, a direct consequence of a conflict that has uprooted the state's very ability to govern.
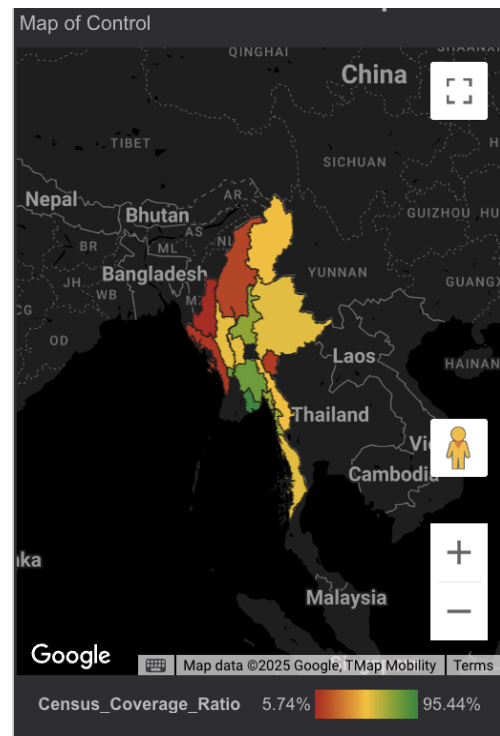
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1. The National Picture: A 37% Governance Gap

The headline finding of this analysis is the stark difference between the 2019 baseline population and the number of people the SAC was able to enumerate in 2024. The data reveals a "governance gap" of 19

million people, meaning the state was unable to account for 37% of its baseline population. The national average census coverage was a mere 53.71%, confirming a systemic failure to perform basic state functions in nearly half the country. This is the quantifiable measure of state collapse.

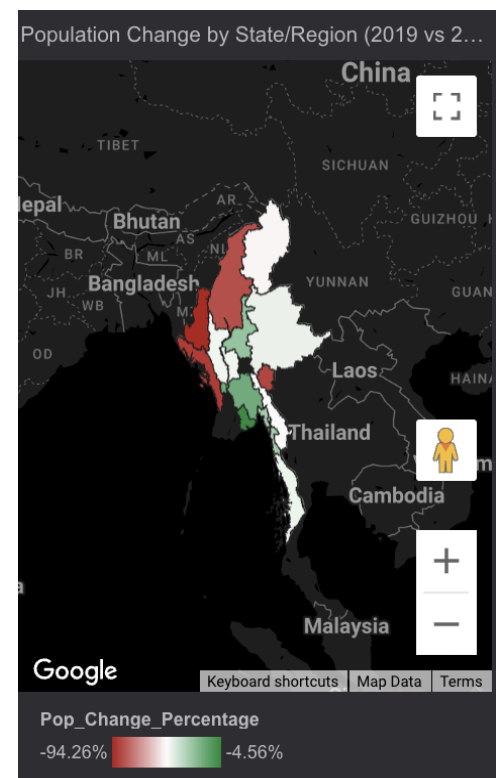## 2. The Geographic Fracture: Mapping the Collapse of Control

The collapse of state administration is not uniform but follows clear geographic lines that correlate with conflict intensity. The "Map of Control" visualizes the SAC's administrative reach by coloring each State/Region based on its census coverage ratio. The result is a clear portrait of a fractured nation, divided between a relatively stable core (Yangon, Naypyitaw) and collapsed peripheries (Chin, Rakhine, Sagaing). This map serves as the primary visual evidence of a state that has lost control over vast swathes of its territory.

3. Visualizing the Consequences: Population Shifts in a Fractured Nation

This map provides the crucial second layer to our analysis, illustrating the demographic consequences of state collapse. It visualizes the average population change (Pop_Change_Percentage) for each State and Region between 2019 and 2024. The color scale is designed to show population loss in red and population stability/gain in green.

The map reveals a powerful and direct correlation: the regions showing the most severe administrative collapse on the "Map of Control" (Chin, Rakhine, Sagaing) are the same regions colored in the deepest red, signifying the largest average population decline. Conversely, the most
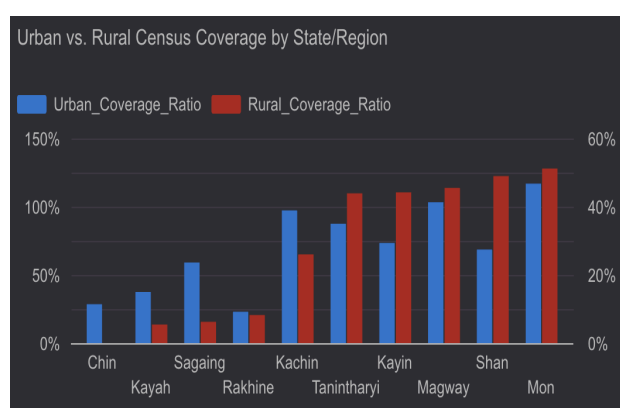
stable regions (Yangon, Naypyitaw) are colored grey/green, indicating near-zero population change. This visual link proves that the collapse of governance is a primary driver of population loss at a regional scale, as people flee the insecurity and violence of these "uncountable" territories.

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4. The Smoking Gun: The Collapse is Rural, Consolidation is Urban

The "Urban vs. Rural Census Coverage" chart reveals the core dynamic of the conflict: the state has not collapsed evenly, but has strategically retreated from the countryside. In nearly every conflict-affected state, the SAC maintains a measurable administrative presence in urban centers while its functions in rural areas have evaporated.

In Sagaing Region, the disparity between urban (59%) and rural (6%) coverage is the smoking gun—undeniable proof that the state has been pushed out of the countryside.
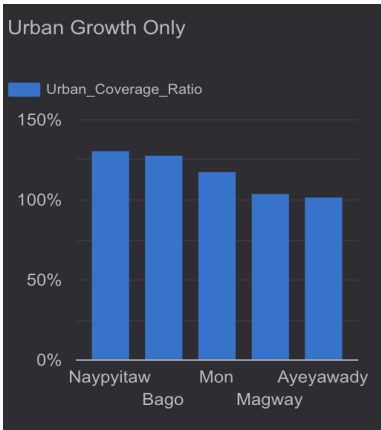

This retreat is accompanied by a consolidation of population in urban strongholds. A coverage ratio exceeding 100% is statistically impossible unless a significant population influx has occurred. The 130% urban coverage in Naypyitaw is therefore definitive proof that the capital is not just stable but is actively swelling, acting as a primary "sink" for a population consolidating around the regime's center of power.

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5. State Consolidation: Identifying the Urban "Sinks"

While much of the country experiences collapse, this chart reveals the powerful counter-narrative of consolidation. By filtering for only those regions with an Urban Census Coverage Ratio greater than 100%, we have identified the primary "sinks" for a certain segment of the population.
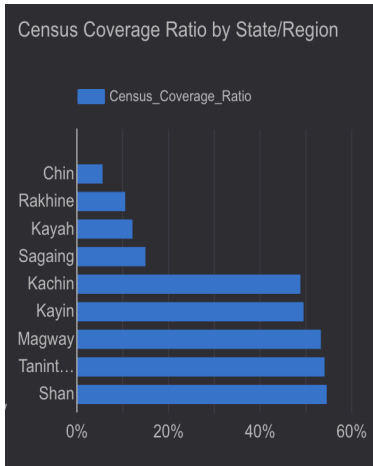
An urban coverage ratio exceeding 100% is statistically impossible unless a significant population influx has occurred. The 130% urban coverage in Naypyitaw is

therefore the "smoking gun"—undeniable proof that the capital is not just stable but is actively swelling, likely absorbing military families, civil servants, and other populations seeking the security of the regime's core territories. The presence of Bago (127%), Mon (117%), Magway (103%), and Ayeyawady (101%) in this list further confirms a pattern of population consolidation into centrally located and heavily controlled urban centers. This is the "Naypyitaw Effect"—the data-driven evidence of a state consolidating its core population while its periphery dissolves.

6. The League Table of Governance

The "Census Coverage Ratio by State/Region" chart provides the ranked, granular proof of the geographic fracture. It functions as a "league table" of state control, allowing for direct comparison of administrative functionality between regions.

The chart clearly identifies the epicenters of state collapse, with Chin State (6%), Rakhine State (11%), and Kayah State (12%) at the bottom, signifying a near-total absence of state presence. This quantitative ranking moves beyond anecdotal evidence to provide a definitive measure of regional stability.

7. Data Transparency: The Complete State/Region Ledger

To ensure full transparency and allow for deeper verification, this table presents the complete, finalized dataset used for our analysis at the State and

	SR_Name_Eng	Population_2019	Population_2024...	Census_Cov... ▼
1.	Naypyitaw	1,183,314	1,129,344	95.44%
2.	Yangon	7,831,830	7,370,010	94.1%
3.	Ayeyawady	6,140,001	5,546,281	90.33%
4.	Bago	4,814,582	3,881,164	80.61%
5.	Mandalay	6,168,225	4,465,598	72.4%
6.	Mon	1,889,274	1,286,073	68.07%
7.	Shan	5,384,244	2,944,515	54.69%
8.	Tanintharyi	1,426,426	773,249	54.21%
9.	Magway	3,805,211	2,032,042	53.4%
10.	Kayin	1,556,552	772,609	49.64%
11.	Kachin	1,584,375	775,273	48.93%
12.	Sagaing	5,309,914	802,344	15.11%
13.	Kayah	311,448	38,240	12.28%
14.	Rakhine	3,230,175	345,431	10.69%
15.	Chin	509,037	29,234	5.74%

Region level. It provides the raw baseline population from the 2019 Inter-Censal Survey, the total enumerated population from the October 2024 data collection, and the resulting Census Coverage Ratio that serves as the core metric for this report.

The table is sorted by the Census Coverage Ratio in descending order, effectively functioning as a "league table" of state control. It clearly ranks the regions from the most stable administrative zones, such as Naypyitaw (95.44%) and Yangon (94.1%), down to the zones of near-total state collapse, like Rakhine (10.69%) and Chin (5.74%). This ledger provides the foundational, verifiable evidence for every map, chart, and conclusion presented in this analytical brief.

Conclusion: The Displacement of Governance

The conflict in Myanmar has reshaped the country. The 2024 census data proves that this reshaping is not just about the movement of people, but about the fundamental displacement of the state itself. The government has been pushed out of the countryside and is consolidating in the cities, creating two distinct Myanmars: an urban core where its authority remains, and a vast rural periphery where it is functionally absent.

This has profound implications for all international actors. Policy engagement, humanitarian aid, and stability analysis must now contend with this fractured reality. The "governance gap" is no longer a theoretical concept; it is a measurable geographic and demographic fact. The primary story of "The Great Displacement" is the story of a state that has lost control of its country.